

A simple planning checklist

Small steps that can make a big difference for the people you love. You don't need to do everything at once. Even completing one or two items can help.

Personal details – keep a list

Full name

Date of birth

National Insurance number

Address

GP details

Marriage/Civil partnership details (where relevant)

Parent, child and siblings details (where relevant)

Financial information

(Keep this in one place, keep it updated and let someone you trust know where it is).

Bank and building society accounts

Pensions (workplace and private)

Life insurance policies

Savings and investments

Credit cards, loans, overdrafts

Mortgage or rent details

Utility providers

Employer details

Any regular payments or subscriptions

Will

(If you don't have one yet, even making a simple will is a good start).

I have a will

I know where my will is stored

I've told someone where to find it

I've named executors

I've reviewed it in the last few years

Declare beneficiaries

Notify employer of preferred Death in Service beneficiaries

Notify pensions of preferred beneficiaries

Funeral and personal wishes

Burial or cremation preference

What I'd like to happen to my ashes (if relevant)

Type of service (or no service)

Any music, readings, or preferences

Anything I definitely would not want

I've written this down or talked to someone about it

Lasting Power of Attorney (LPA)

Health and welfare LPA considered or in place

Property and financial affairs LPA considered or in place

I've chosen people I trust

I know where the paperwork is

Digital life

List of important online accounts

Guidance on what should happen to social media accounts

Passwords stored securely (or access details shared safely)

Final step

I've told at least one trusted person where this information is kept

***You don't need to do
this all today.***

Doing a little now can spare your
loved ones a lot of stress in the future.